

## REGISTRATION FORM

### Estate Planning Beyond Estate Tax

Presented by the Trusts and Estates Section of the State Bar of California

**Note:** Please use a separate form for each registrant.

Name \_\_\_\_\_

State Bar Number \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

#### REGISTRATION FEES (check appropriate box)

- ☐ \$195 Members  
of The State Bar of California Trusts and Estates Section
- ☐ \$255 Non-Members  
☐ Please credit \$60 of my non-member registration fee  
to my 2002 membership dues in the Trusts and Estates Section

#### CREDIT CARD INFORMATION

I authorize The State Bar of California to charge my program registration to my VISA or MasterCard account. (No other credit card will be accepted.)

Account Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Card Holder's Name \_\_\_\_\_

Cardholder's Signature \_\_\_\_\_

#### DEADLINE

Your form and check, payable The State Bar of California, or credit card information must be received by July 1, 2002.

#### MAIL TO

Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

#### FAX

Program Registrations at (415) 538-2368. Credit Card information is mandatory.

STATE BAR EDUCATION FOUNDATION

Trusts and Estates Section  
180 Howard Street  
San Francisco, CA 94105

THE STATE BAR OF CALIFORNIA  
Trusts and Estates Section

Presents

# Estate Planning Beyond Estate Tax

July 18, 2002

Hyatt Regency San Francisco (Embarcadero)  
5 Embarcadero Center  
San Francisco, CA 94111  
8:30 a.m. to 5:15 p.m.



7.5 hours MCLE Credit  
(including 2.5 hours ethics credit)

The State Bar of California and the Trusts and Estates Section certifies that this activity has been approved for MCLE credit by the State Bar of California in the amount of 7.5 hours

## Estate Planning Beyond Estate Tax

A one day comprehensive program focusing on estate planning issues which remain important despite the uncertain future of the federal estate tax system, such as:

- What issues need to be considered in advising clients on onshore or offshore asset protection planning?
- How to address ethical and conflict issues that may arise in representing trustees.
- How can estate planners help families learn to deal with silver spoon kids?
- An update of important Proposition 13 issues to consider so as to avoid property tax reassessment in real property transfers.
- What are the effective mechanisms for ensuring client's health care decisions are honored?
- How to detect, prove and prevent falsified estate planning documents.

The lecturers are well known experts who will provide insights, updates, and advice on these and other issues.



## PROGRAM AGENDA AND PARTICIPANTS

### 8:30 am to 10:30 am Onshore and Offshore Asset Protection Planning - What You Should Know

Howard D. Rosen, Esq., Donlevy-Rosen & Rosen  
Coral Gables, FL  
Jane Monahan, Esq., Wilmington Trust Company Wilmington, DE

This panel will address the fundamentals of onshore and offshore asset protection structures, fraudulent transfer law, tax consequences of asset protection planning, and related asset protection matters.

### 10:45 am to 11:45 am How to Avoid Change in Ownership and California Property Tax Reappraisal Under Proposition 13

Kristine Cazadd, Acting Assistant Chief Counsel  
State Board of Equalization, Sacramento, CA

The Acting Assistant Chief Counsel from the State Bar of Equalization will address important Proposition 13 issues to consider so as to avoid reassessment in the transfer of real property, including how to make disproportionate transfers to and from legal entities proportionate, how to correct life estate transfer where grandparent/grandchild exclusion does not apply, how to handle unreported changes in ownership, and a discussion of other reassessment exclusions available to taxpayers.

### 11:45 am to 1:15 pm Lunch Presentation

Eileen Gallo, Ph.D., The Gallo Institute, Los Angeles, CA  
Jon J. Gallo, Greenberg Glusker Fields Claman Machtinger & Kinsella LLP, Los Angeles, CA

The founders of The Gallo Institute and Co-authors of Silver Spoon Kids: How Successful Parents Raise Responsible Children will provide helpful insights into how to understand and address psychological and emotional issues of raising wealthy children.

### 1:20 pm to 2:50 pm Ethics, Bioethics and Law of Making Health Care Decisions

Leah V. Granof, Esq., Law Offices of Leah V. Granof, Encino, CA  
David C. Blake, Ph.D., JD, Vice President- Mission & Ethics  
Saint John's Health Center, Santa Monica, CA

This course will discuss the legal and medical environment of life-sustaining medical interventions, the effective mechanisms for ensuring health care decisions are honored for competent and incompetent persons and the ethical and advisory roles of the attorney helping clients maintain control of their health care decisions.

### 3:00 pm to 4:00 pm The Law and Science of Questioning Documents

Lynard C. Hinojosa, Esq., Hinojosa, Khougaz & Wallet, Los Angeles, CA  
Howard C. Rile, Jr., Long Beach, CA

This panel will provide expert advice on how to detect, prove and prevent forged and falsified estate planning documents as well as share actual case experiences.

### 4:15 pm to 5:15 pm Ethical and Malpractice Issues in Representing Trustees

John A. Hartog, Esq.  
Law Offices of John A. Hartog, Orinda CA

This course will discuss what to do when your client dies and someone else (or even worse, the surviving spouse) becomes the successor trustee. Obtaining proper consents and waivers; determining the existence of the privilege, and protecting it if it does; identifying and avoiding conflicts; and practicing defensively to maintain a level E & O premium.

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Registration begins at 7:45 a.m.

## REGISTRATION INFORMATION • PROGRAM MATERIALS

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**ON-SITE REGISTRATIONS** On-site registration is on a space-available basis only.

**QUESTIONS** For registration information please call (415) 538-2206.

**REFUNDS** All requests for refunds must be in writing and received by July 1, 2002.

**SPECIAL ASSISTANCE** For special assistance, please call (415) 538-2206 or TDD for speech and hearing impaired, please call (415) 538-2231.

**TAPE & AUDIO** If you would like to order an audio cassette and program booklet, please contact Versa-Tape Company at (800) 468-2737. Cost for the tape and booklet is \$170.00. MCLE self-study only.